



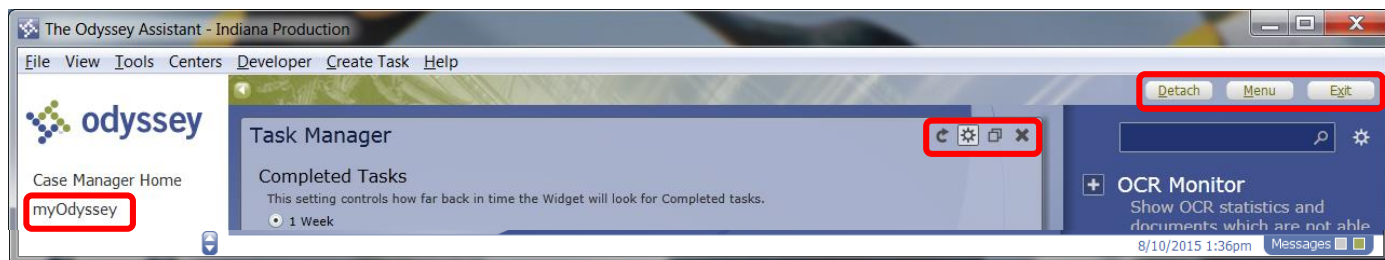
Odyssey CMS Cheatsheet

Topic: Task Manager (myOdyssey)

Date: 4/6/2016

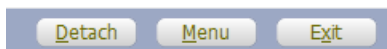
Summary: This cheatsheet will explain how to use task manager in Odyssey.

Important: Odyssey is software owned by Tyler Technologies, Inc. Any screenshots of Odyssey may contain proprietary information that should not be disclosed to non-Odyssey users.



General:

1. Task Manager can be found under 'myOdyssey' in the left hand navigation.
2. The queues available in this feature are defined locally by the Clerk and Courts. In order to see a queue, you must be a member of that queue.
3. Tasks are worked individually and cannot currently be worked in groups.





Detach: Detach allows the user to pop the screen away from Odyssey. Using this feature will allow the task manager portion to display on a separate monitor or for the user to have multiple instances of Odyssey running at one time.

Menu: Menu can be used to display the options available to the user on the right hand side of the task manager process. Closing this feature allows for more screen space.

Exit: Exit closes the Task Manager feature.




Arrow: The arrow  is a refresh button. Users will need to refresh queues throughout the day to stay current. Please note that if annotating a document and corrections or additions need to be made after saving, the refresh button will need to be used before re-opening the document to annotate.


Gear: The gear  allows the user to customize the task manager column display and list filters. It also allows the user to change the default font size of the Task Manager.





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Minimize and Maximize:  Allows user to control the size of the screen.









X: The  will close the Task Manager screen.

Queues:

1. The queues in which you are a member will show in Task Manager.
2. In order to work on an item in the queue, click the start button.

My Tasks									
	Description ▼	As ▼	Due Date ▼	Priority ▼	C ▼	Status ▼			
▶	Case Fully Briefed - 02A03-1412-Cf Edgar,			1	Clerk	Paused (07/20/2015 10:07 A	Start	Pending	

3. Once start has been selected, the queue will expand to offer details and buttons. The buttons that display will depend on user rights.

Description	▼	As	▼	Due Date	▼	Priority	▼	C	▼	Status	▼	
◀ Motion Filed 29D03-1501-CC-00014		Edgar,				1		Hami		In Progress (07/09/2015 03:		Pause Pending
<div>Data Notes History</div>												
Case Information												
Case Number: 29D03-1501-CC-000143												
Style: Nextgear Capital Inc												
vs. Georgia Used Cars LLC,Arti Jaiswal												
Case Event Information												
Event Type: Motion Filed (M) 7/6/2015												
Related Documents												
		Date	▼	Type	▼	Name	▼	Description	▼			
Click here to relate a document												
		7/7/2015		RJO Entry		Proposed Order Filed						
		7/7/2015		RJO Entry		Porposed Order for Dismissal						
		7/7/2015		RJO Entry		Proposed Order Filed						
		7/7/2015		RJO Entry		Proposed Order Filed						
<div>Move Assign Complete</div>												
<div>Priority / Due Date</div>												

Case Number: The case number displaying is a hyperlink to open the case within Odyssey.

Documents: Documents displaying may have been configured to appear. Users can also add additional documents to the queue item by clicking the “Click here to relate a document” feature. The option will open the documents tab of that case for selection of additional documents.



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Date	Document Type	Document Name	Pgs
<input type="checkbox"/> 07/16/2015	Motions/Requests/Petitor	FileName	3
<input type="checkbox"/> 07/15/2015	Pleading/Complaint	FileName	2
<input type="checkbox"/> 07/15/2015	Motions/Requests/Petitor	FileName	1
<input type="checkbox"/> 07/14/2015	Motions/Requests/Petitor	FileName	2
<input type="checkbox"/> 07/15/2015	Motions/Requests/Petitor	FileName	1
<input type="checkbox"/> 07/06/2015	Motions/Requests/Petitor	Motion Filed	0
<input type="checkbox"/> 06/16/2015	Motions/Requests/Petitor	Motion Filed	0
<input type="checkbox"/> 07/10/2015	Motions/Requests/Petitor	Order for Dismissal	2
<input type="checkbox"/> 03/03/2015	RJO Entry	Order Granting Motion for Enlargement of	1

*Please note the thumb tack icon indicates that notes have been added to the document.

**Please also note that the process for scanning to Odyssey creates TIFF files.

If you need to convert a document to a PDF in Odyssey:

1. Navigate to the case.
2. Right-click on the document from the Documents tab.
3. Select **Perform OCR**.

Doc	Date	Type	Name	Pgs	Mark
	05/14/2015	Miscellaneous	Bond Form Filed	3	x
	06/29/2015	Miscellaneous	Document Filed	0	x
	06/29/2015	Miscellaneous	Document Filed	0	x
	06/29/2015	Miscellaneous	Document Filed	0	x
	06/03/2015	Motions/Requests/Petitions	Motion to Consolidate Filed	2	x
	06/03/2015	Motions/Requests/Petitions	Order Granting Motion to Consolidate	1	x
	05/12/2015	Motions/Requests/Petitions	Order on Initial Hearing	1	x



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Move: Move allows the user to move the item to another queue. You may only move Tasks to queues you have permissions to access/view.

A dialog box titled "Move Task" with a close button (X) in the top right corner. It contains a label "* New Queue" followed by a dropdown menu. At the bottom, there are two buttons: "OK" and "Cancel".

Assign: Assign allows the item to remain in the same queue but be assigned to another user. If this concept is used, the assigned user would likely use the "My Tasks" option at the top of Task Manager. "My Tasks" shows everything assigned to a specific user across all queues. *Please note that the assign feature lists all Odyssey users. It may take a little time for the list to load.

A dialog box titled "Assign Task" with a close button (X) in the top right corner. It contains a label "* New User" followed by a dropdown menu. At the bottom, there are two buttons: "OK" and "Cancel".

Complete: Complete removes the case and item from the workflow process as a whole. If complete is selected in error, the user will need to navigate to the case and "Create Task" manually from the case.

Priority/Due Dates: Users can change the priority of items and set due dates. Please note that items automatically added to workflows by Odyssey will be set to a priority of "1" by default. They can be lowered if desired.

A dialog box titled "Set Priority and Due Date" with a close button (X) in the top right corner. It contains a label "* Priority" followed by a text input field with the value "1". Below this is a label "Due Date" followed by two input fields: "Enter date" with a calendar icon and "Enter time" with a clock icon. At the bottom, there are two buttons: "OK" and "Cancel".

Pencil: The pencil allows the user to annotate the pdf. Annotation can include adding a signature, adding initials, adding text, adding file stamp information. If annotation is used when the user clicks "Save" the document will be updated in task manager and on the document tab of the case. Notes can also be added to the document using the pencil icon. Notes will not display on the document itself, or to the public. Please note the instructions regarding refreshing if further annotation or corrections are needed after saving the document.

Annotations:

Signature and initials: Signatures and initials are configured on the user's Odyssey account. Each user can have one signature and one set of initials. To apply either, the user will click on the "S" or the "I" and then create a box on the document to indicate where the information should be applied.



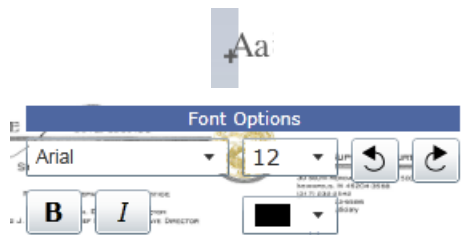


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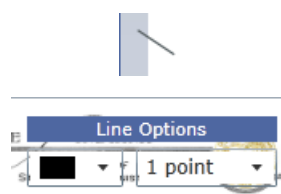
Document Stamps: These stamps allow users to enter file stamps, court seals, and judge signatures into documents. Initials are included.



Text Tool: To apply text, the user should click on the text tool and then navigate to the area of the document that text should be applied, click and begin typing. Please note the font and font size can be altered. *At this time, we have been unable to find a way to default this.



Strikethrough: The strikethrough can be used to indicate text is no longer valid. The user can click on the icon, navigate to the area to be marked, click and drag over the unwanted text. Please note that the line option can be changed and likely should be changed to make the line darker. Like the text tool, we have been unable to find a way to default this at this time.





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Notes: Notes can be added to a document in the annotation window. The push pin in the lower left hand corner will activate a notes section. The notes are only visible in the document window and not to the public. Notes will not print.

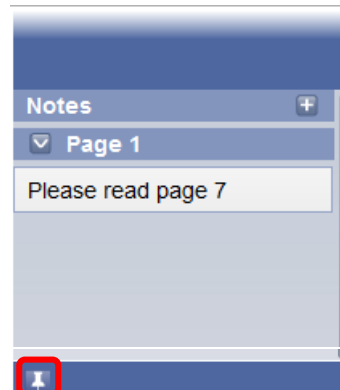


Image Tool: In myOdyssey annotation, the Image icon can be used to “white out” information that needs to be redacted from a PDF. Blank white images are inserted to the document and placed over text and resized as needed.

Please contact Trial Court Technology to obtain jpg files that can be saved to your desktop or located on the shared drive in your county.



If you wish to work on an item in task manager, you can click on the case number link. The Odyssey case will open. Users can then add the event needed, schedule a hearing, or add entries needed.

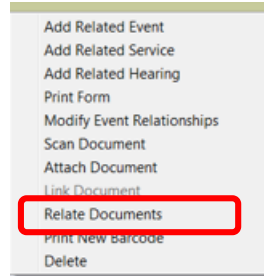
If an event is being added, the user can then relate any document to the event that appears on the document tab of the case.

For example, if task manager contains an Order that has been signed. The user can add the applicable Order event to the case, right click, and relate the signed pdf document.



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Right click and select "Relate Documents":



Find the document that needs to be related to your event and check mark.

Service of the document, if needed, will now need to be completed.

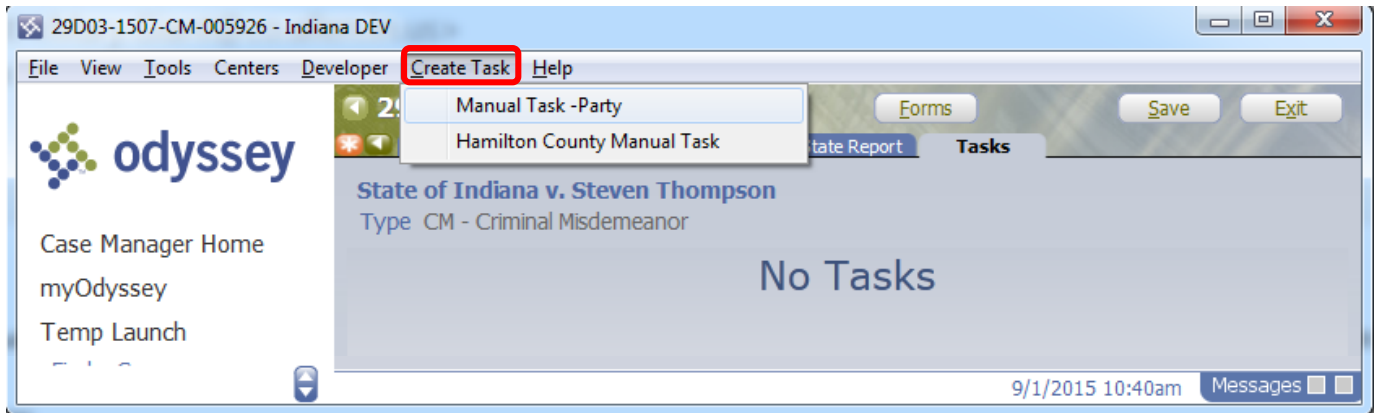


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Creating a Task and Adding a Document

Creating a task manually is helpful if you accidentally click “Complete” on a task in the queue or if you need to attach a document.

1. Navigate to the case to be associated with the task.
2. In the toolbar, click on Create Task and select the type of manual task.



3. Fill out the applicable fields in the Manual Task screen. When finished, click **Send**.

A screenshot of the "Hamilton County Manual Task" form. The form has a title bar "Hamilton County Manual Task" and a close button. It contains several sections: "Task Information" with fields for "Task Description" (containing "29D031507CM005926 Appearance Filed"), "Priority" (containing "50"), and "Due Date" (containing "9/1/2015" with a calendar icon); "Task Assignment" with radio buttons for "Task Queue" (selected) and "User", and a dropdown menu for "Task Queue" (containing "Superior 3 Judge"); "Attach Documents" with a button and text "0 documents attached"; and "Notes" with a large text area. At the bottom are "Send" and "Exit" buttons.

- a. Include the case number without dashes as well as a description of the task in the Task Description field.
- b. Enter a due date.
- c. Select the proper task queue for the task.
- d. Attach the document(s).

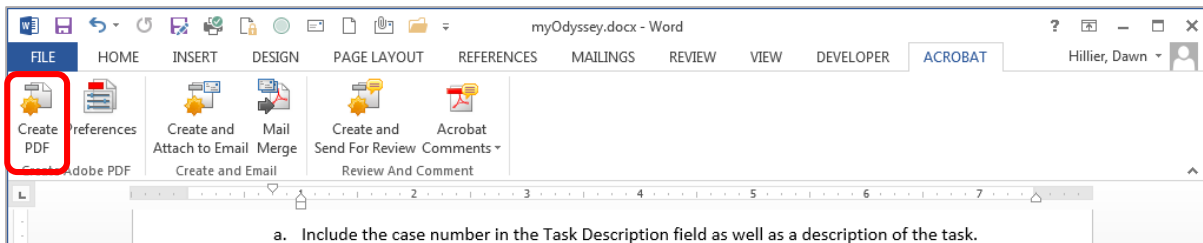


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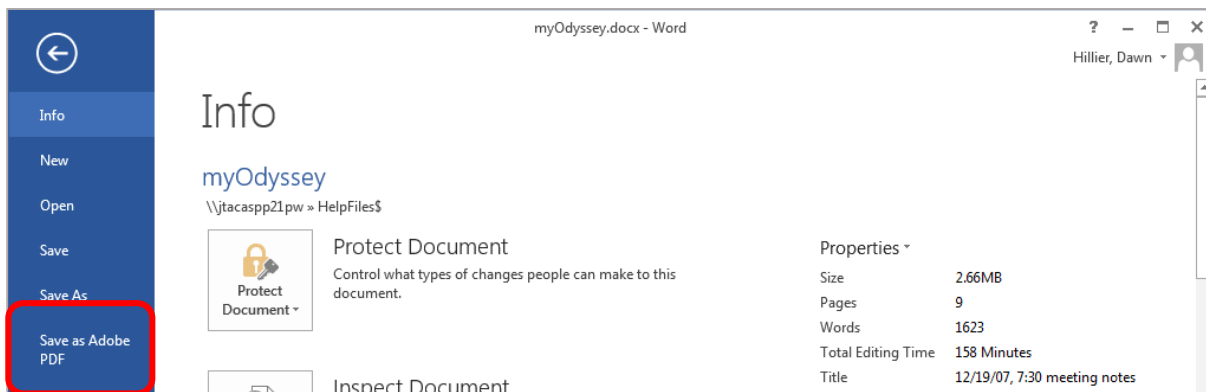
Steps For Electronically Signing An Order

This section also explains how to create a PDF from Word and how to attach a document to a case.

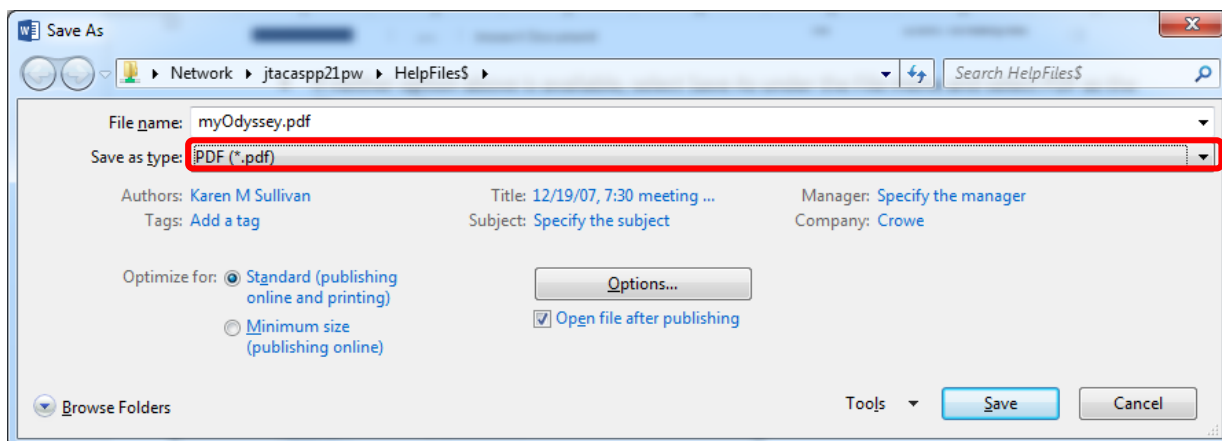
1. Create your order in word just as you normally would do and save it.
2. Create/Save the Word Document as a PDF. You can do this in several ways:
 - In the Word toolbar under the Acrobat menu, click on Create PDF.



- Click the File menu and select Save as Adobe PDF.



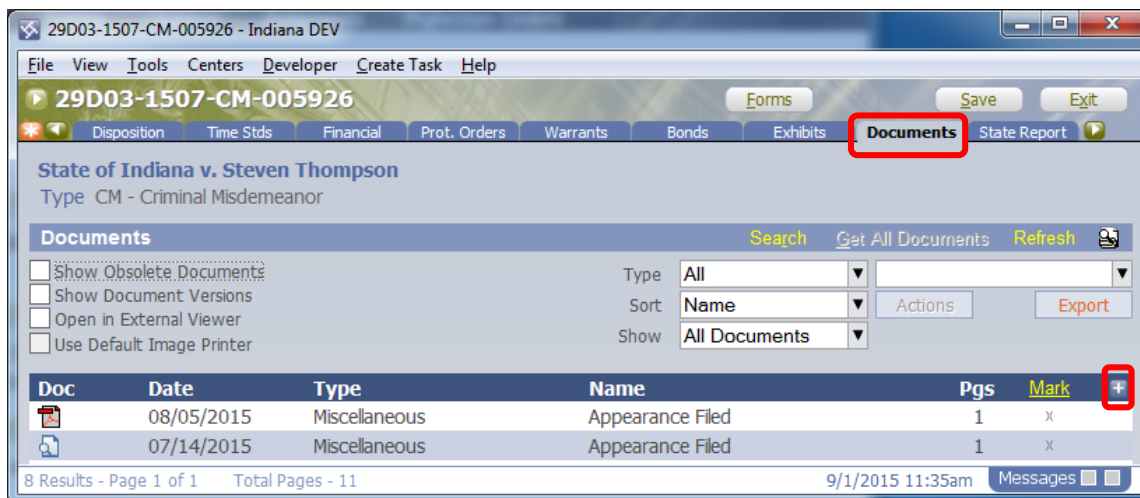
- If neither option above is available, select Save As under the File menu and select PDF as the file type in the dropdown menu.





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3. Open Odyssey and go to the case for which you have created the order.
4. Select the Document tab of the case. You will need to click the arrows to get to this tab.
5. In document tab select the + at the right end of dark blue line. This opens an add document window.



6. In the Add Document window, give the document a name and select Order as the Document Type. Click the "Attach" button in lower left corner of window.

Add Document

Name:

Type:

Security Group:

Description:

Effective Date:

Obsolete Date:

7. This will open a selection window for your computer. Navigate to the location where you saved the PDF. Select this file, then click the open button.
8. The document will then appear on the document tab of the case.
9. While still in the case, select the Create Task option in the upper left corner of your screen in the toolbar. A drop down appears for Hamilton County Manual Task - select this option.



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10. Fill out the Manual Task window. In Description, you may enter anything but be sure to include the full case number without dashes to permit the orderbook and staff to search for this task in their queues. Select the task Queue to which you wish to assign the task. In this example, I selected Superior 3 Judge because I wanted to electronically sign the document. If you wish another staff member to sign the document or to print for actual signature, you will want to choose the task queue primarily used by that staff person. Select Send when finished.

Hamilton County Manual Task

Task Information

* Task Description 29D031507CM005926 Order to be Signed

* Priority 50

Due Date 9/1/2015

*** Task Assignment**

☒ Task Queue Superior 3 Judge

☐ User

Attach Documents 0 documents attached

Notes

Send Exit

11. The document you created is now in the electronic Queues for processing. If you wish to sign electronically, use the same procedures you would use for any other order.

Transmitting an Order signed by hand through the Electronic Queues

1. Prepare the order as you normally would and affix your signature.
2. Use the copier to email yourself or a staff person a digital copy of the order in signed form. If your copier does not send scanned files to you in PDF, you can ask ISS to show you how to change this setting on the copier.
3. Open the email and save the document to your computer.
4. Open the case for which the document was created or signed in Odyssey. From this point follow steps 5 - 10 above.